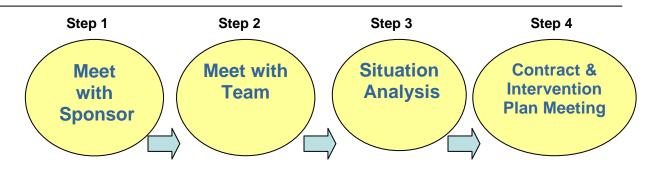
Overview of Lean Engagement Process

This is the process in which Continuous Improvement Practitioner's (CI-Ps) begin the work with the requesting Sponsor, Manager, and Team. The purpose is to meet the sponsor, manager, and team; identify the situation and issues; get clarity on what is being requested; provide overview of BTC & Lean principles; begin chartering, tour the site; collect data as necessary; develop the contract & intervention strategy; and schedule interventions/events.



CI-Ps, Sponsor, Who:

Manager

CI-Ps, Team, Sponsor, Manager CI-Ps

CI-Ps, Sponsor, Manager, Team

Overview of Process What:

ID situation: ID Widget; ID data available; Begin Charter disc.

Outcomes wanted;

Site Tour:

What do we see?

Lean Orientation;

Overview of

Intervention Process: ID situation: What do we see;

Q & A.

Analyze Data; **Draft Contract &** Intervention Plan

Draft Charter Start CI-P ID/planning of roles/work

Review: Contract, Charter, Intervention Plan, and schedule. **Begin CI-P preparation** of Design Notes, etc.

Materials: Engagement

Process What is BTC? What is Lean? Roles & Resp **Charter Template**

Engagement **Process** What is BTC? What is Lean? **Data collection** Sheets Pre-Int. Handbook

Contract. Intervention Plan, Data analysis Tools.

Contract. Charter. Intervention Plan, **Schedule**

Time:

@ 2 hrs

@ 2 hr

@ 8 hr

@ 2 hrs

Outcome: Sponsor introduced

to Lean & the Intervention Process.

Commitment to move forward.

CI-P develops initial understanding of the need.

Team introduced to Lean & the Intervention Process. Team commitment to

standing of need.

participate. CI-P expands underIntervention strategy developed, based on analysis of data collected.

Approved contract. Finalized Charter. Intervention Schedule. High agreement on What & How.